

YOUR IMPACT INVESTING CHECKLIST

UPDATED JUNE 2016

Seattle Foundation, with the support of its strategic partners, is uniquely positioned to help philanthropists participate in transformative social strategies that accelerate community growth. Together with the experts at Threshold Group and Canopy, our team has the knowledge and skill to find innovative commercial solutions that address issues of economic and racial equity within the borders of our local community.

KEY STEPS TO BECOME AN IMPACT INVESTOR:

- ☐ Investment criteria is aligned and minimum is met
- ☐ Approval received from Impact Investment Committee of Board of Trustees
- ☐ Due diligence completed in partnership with Threshold Group
- ☐ Impact Investment Recommendation form completed and submitted
- ☐ Plan complete to transfer assets from a Seattle Foundation fund
- ☐ Annual investment reports and new investment opportunities reviewed quarterly
- ☐ Stories shared in social media to motivated other philanthropists

For more information about impact investment opportunities, please contact Seattle Foundation's Philanthropic Services team at (206) 515-2111 or philanthropicservices@seattlefoundation.org.